

**UNITED STATES DISTRICT COURT**  
**SOUTHERN DISTRICT OF WEST VIRGINIA**  
**AT**

V.

**REPORT OF PARTIES' PLANNING MEETING**  
**CASE NUMBER**

*Guideline for parties and attorneys:*

The parties are advised to use the *Worksheet for Report of Parties Planning Meeting* (Form USDC/ATTY-004 located on the Court's website at [www.wvsd.uscourts.gov](http://www.wvsd.uscourts.gov)) and the suggested guidelines contained in the form's comments.

1. Pursuant to Fed.R.Civ.P. 26(f), a meeting was held on \_\_\_\_\_. Those participating were:

\_\_\_\_\_ for plaintiff(s)  
\_\_\_\_\_ for defendant(s) \_\_\_\_\_  
\_\_\_\_\_ for defendant(s) \_\_\_\_\_  
\_\_\_\_\_ for defendant(s) \_\_\_\_\_

2. Pre-Discovery Disclosures. The parties will exchange by \_\_\_\_\_  
the information required by Fed.R.Civ.P. 26(a)(1).

3. Plaintiff(s) should be allowed until \_\_\_\_\_ to join additional parties and  
until \_\_\_\_\_ to amend the pleadings. Defendant(s) should be allowed until  
\_\_\_\_\_ to join additional parties and until \_\_\_\_\_ to amend the  
pleadings.

4. Discovery Plan. The parties jointly propose to the court the following discovery plan:  
[Use separate paragraphs or subparagraphs as necessary if parties disagree.]

Discovery will be needed on the following subjects: ?

This action \_\_\_\_\_ suitable for designation as a complex case requiring special case management procedures and additional pretrial conferences. If the parties and attorneys believe that the case is complex, the basis for that belief is: ?

The last date to serve discovery requests is \_\_\_\_\_. The last date on which to take a discovery deposition is 45 days after the last date to serve discovery requests. The last date on which to take a discovery deposition is known as the “discovery completion date.” [Discovery on \_\_\_\_\_ to be completed by \_\_\_\_\_.] ?

The parties \_\_\_\_\_ adopt the discovery limits set forth in the Federal Rules of Civil Procedure. If the parties and attorneys believe that more discovery is needed, the basis for that belief is: ?

Reports from retained experts under Rule 26(a)(2) due:

By the party with the burden of proof on an issue: \_\_\_\_\_?

By the party not bearing the burden of proof on an issue: \_\_\_\_\_?

Expert witness disclosures intended solely to contradict or rebut evidence on the same issue identified by another party: \_\_\_\_\_?

5. Magistrate judges will resolve discovery disputes. The parties \_\_\_\_\_ to have a United States magistrate judge conduct any and all further proceedings in the case, including trial, and order the entry of a final judgment.

6. Mediation shall take place on or before \_\_\_\_\_?

7. Potential dispositive motions shall be filed by \_\_\_\_\_?, with responses and replies filed according to the Local Rules.

8. The parties request a pretrial conference in \_\_\_\_\_?

The plaintiff(s) shall submit a proposed pretrial order to defendant(s) on or before \_\_\_\_\_?

The defendant(s) shall compile a proposed integrated pretrial order and submit it to chambers of the presiding judicial officer on or before \_\_\_\_\_?

9. Final lists of witnesses and exhibits under Rule 26(a)(s): \_\_\_\_\_?

Due from plaintiff(s) \_\_\_\_\_

Due from defendant(s) \_\_\_\_\_.

Objections to the final list of witnesses and exhibits under Rule 26(a)(3) are due \_\_\_\_\_?

10. Where applicable, proposed jury instruction shall be exchanged and transmitted to chambers of the presiding judicial officer in WordPerfect format on or before \_\_\_\_\_?

11. Where applicable, proposed findings of fact and conclusions of law shall be exchanged and transmitted to chamber \_\_\_\_\_? of the presiding judicial officer in WordPerfect format on or before \_\_\_\_\_.

12. A final settlement conference will take place on \_\_\_\_\_?

13. The case should be ready for trial by \_\_\_\_\_, and at this time is expected to take approximately \_\_\_\_\_ days. ?

The parties \_\_\_\_\_ a conference with the court before entry of the scheduling order.

The form consists of several horizontal lines for text entry. On the left side, there is a blue circle containing a question mark, with a blue arrow pointing to the first line. A vertical blue line runs down the left side, with horizontal blue arrows pointing to the first, second, and fourth lines. On the right side, there is a red arrow pointing to a red label that says "SIGN HERE". A vertical red line runs down the right side, with horizontal red arrows pointing to the first, second, and fourth lines. There are also horizontal red arrows pointing left from the first and second lines, and horizontal blue arrows pointing right from the first, second, and fourth lines.